

THE STANDING FOREST · CHAPTER NINE

The Field Manual

Chapter Nine of The Standing Forest

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A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

This chapter sets out one year of work, week by week, for an organisation that has decided to see the ground it stands on and to act on what it sees. It is written for the person who will run it: a chief executive, an operations director, the head of a school or a housing association, the owner of a business with forty people in it. It names the roles, the meetings, the decisions and the documents, and it says at each stage what can go wrong and what to do about it. The year has four quarters, and each has a single job. The first quarter is for seeing, and sets no targets at all. The second is for drawing the whole portrait and opening the argument. The third is for trying things. The fourth is for writing down what has been learned so that it outlasts the people who learned it. An organisation that skips the first quarter, which most are tempted to do, will spend the rest of the year defending targets it set before it knew where it stood.

CHAPTER NINE

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A year, not a programme

This chapter sets out one year of work, week by week, for an organisation that has decided to see the ground it stands on and to act on what it sees. It is written for the person who will run it: a chief executive, an operations director, the head of a school or a housing association, the owner of a business with forty people in it. It names the roles, the meetings, the decisions and the documents, and it says at each stage what can go wrong and what to do about it.

The year has four quarters, and each has a single job. The first quarter is for seeing, and sets no targets at all. The second is for drawing the whole portrait and opening the argument. The third is for trying things. The fourth is for writing down what has been learned so that it outlasts the people who learned it. An organisation that skips the first quarter, which most are tempted to do, will spend the rest of the year defending targets it set before it knew where it stood.

The pace is deliberate. Santa Anna's *Ecstatic Economics* asks the reader, at the end of one chapter, for something small:

> *Not a grand transformation, but a seed — something small enough to start this week.*[71]

The year below is built from seeds. Each quarter's work is small enough for the organisation to do alongside its ordinary business, and each depends on the one before it. The book's other insistence is that the inner work and the structural work go together:

> *Consciousness transformation and structural transformation must proceed together. Neither can substitute for the other.*[72]

In a year of organisational work, that sentence has a plain meaning. The ledgers, portraits and charters are the structure. The way the meetings are held, the way objections are received and the way the first disappointing number is read are the other half. A manual that gave only the documents would produce documents.



The roles

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The roles

Six roles carry the year. In a small organisation one person may hold two of them. No one person should hold all six.

The sponsor. The most senior person who will be accountable for the work: the chief executive, the head, the owner. The sponsor opens each quarter, decides the questions that need a decision, and protects the time. The sponsor does not run the work.

The ring lead. The person who runs the year: convenes the meetings, keeps the documents, chases the figures. Usually someone in operations or finance, because they know where the figures live. The role takes perhaps a day a week in the first quarter and half a day a week after that.

The keeper. A non-executive director, a governor, a trustee, or in a firm without a board a respected senior person outside the line of management. The keeper's job, adapted from the Welsh Future Generations

Commissioner in Chapter 6, is to ask the long-term question at every meeting and to read the shortfall aloud once a year. The keeper has a voice and no veto.

The recorders. One person for each flow or need being counted, who records the figure on the agreed day each week or month. Recorders should be people close to the flow: the facilities manager for energy, the warehouse lead for waste, the payroll administrator for pay against the benchmark.

The working group. Six to ten people from across the organisation, chosen to include the shop floor, the front line and at least one sceptic. The group draws the portrait, runs the Objection Register and designs the trials. Membership changes after six months.

The steward liaison. One person who holds the relationship with the suppliers, growers or landholders the organisation depends on most, and who will visit them. In a small firm this is often the owner.

Before the year begins: two weeks of preparation

Week minus two · The sponsor decides. The sponsor writes one paragraph saying why the organisation is doing this, what it is not doing, and how long it will take. The paragraph should say plainly that the first quarter sets no targets. It should not mention any outcome. The sponsor appoints the ring lead and asks the keeper.

Week minus one · The ring lead finds the figures. Before anyone meets, the ring lead makes a list of every figure the organisation already holds that bears on its flows, its people and its suppliers: utility bills, waste invoices, the purchase ledger, payroll, the leave record, the accounts payable ageing, the training log, the accident book. Next to each, the ring lead notes where it lives and who can produce it. This list is the most useful document of the first month. It nearly always shows that the organisation holds far more than it thought.

Decision for the sponsor: the membership of the working group. Include a sceptic on purpose. A group without one will be ambushed later by objections it never heard.

Quarter one · Seeing (weeks 1 to 13)

The only job of the first quarter is to see accurately. No targets, no policies, no announcements beyond the sponsor's paragraph.

Week 1 · The opening meeting. The sponsor opens, reads the paragraph, and leaves. The ring lead takes the working group through the idea in forty minutes: the coastline, the two rings, the organism in its habitat. Chapters 2 and 4 are enough. Then one question, in the Luminous wording from Chapter 4: where is a virtuous cycle already alive here? Write every answer on the wall. Choose one to name publicly before the meeting ends.

The reason for starting with what works is practical, and Chapter 3 gave it: a team that feels secure in what it has done can look at what it has not. A team that opens with a chart of overshoot will spend the meeting defending itself.

Week 2 · Choose the flows. The working group chooses three to five flows across the coastline to count, in their own units. For most organisations: energy, the largest material, water, waste, transport. The ring lead assigns a recorder to each. Each recorder writes down, before seeing any figure, what they expect it to be.

Weeks 3 and 4 · First readings. The recorders produce the last twelve months of each flow from existing records, in absolute units, month by month, with revenue beside them. The ring lead produces the floor measures for the organisation's own people: pay against the living benchmark, leave taken, turnover, training, injuries, by team.

Week 5 · The first honest number. The working group meets to see the figures for the first time. Chapter 8 described this afternoon. The ring lead opens by reading out the sealed expectations beside the actual figures. The difference is the subject of the meeting.

What can go wrong: the group reads a bad figure as an accusation, and the person responsible for that area defends it. The ring lead should say, before the first figure is shown, that nothing found in the first quarter is anybody's fault, because nobody was asked to count it before.

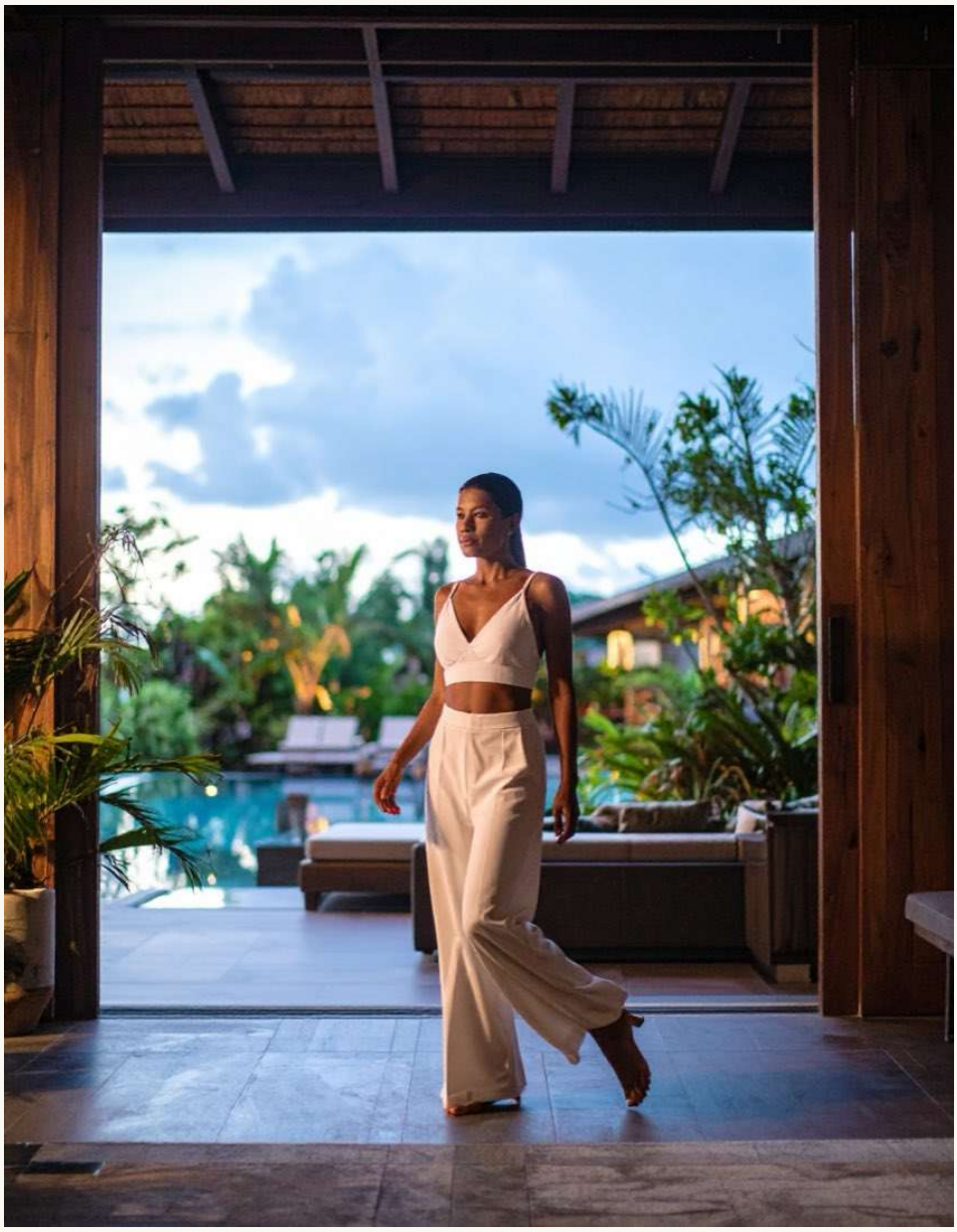
Weeks 6 to 9 · The Two-Ring Ledger. The ring lead completes the Two-Ring Ledger from Chapter 2 for the most recent quarter, with the working group's help. Recorders begin recording their flows weekly or monthly from now on, on the agreed day, in the same unit.

Weeks 10 and 11 · The Metabolism Map. The working group draws the Metabolism Map from Chapter 4 in a ninety-minute session: the diet, the wastes, the output, the body, the loops, the reciprocities, the coat. The blank reciprocities are the most important marks on it.

Week 12 · The sponsor sees it. The ring lead presents the ledger and the map to the sponsor and the keeper, in one hour. The presentation has three parts: what we already do well, what we found that surprised us, and what we still cannot measure.

Week 13 · Quarter review. The keeper asks one question: what did we learn about ourselves this quarter that we did not know? The answer is minuted.

Decision for the sponsor at the end of quarter one: whether to continue. In practice the answer is almost always yes, because the figures are now visible and cannot be unseen. But the sponsor should make the decision explicitly, because a continuation that was never decided can be quietly abandoned.



Quarter two · The whole portrait (weeks 14 to 26)

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Quarter two · The whole portrait (weeks 14 to 26)

The second quarter widens the view from the organisation's own body to its whole habitat, and opens the argument.

Weeks 14 and 15 · Lens one and lens two. The working group completes the first two lenses of the Four-Lens Portrait from Chapter 5: our people, and our place. For lens two, someone finds out what the site was before the organisation was on it. This usually requires a phone call to the local authority or a visit to the library, and it is nearly always worth it.

Weeks 16 and 17 · Open the register. The ring lead opens the Objection Register from Chapter 3 and sends a short note to everyone in the organisation: the work so far, the figures found, and an invitation to raise any objection, in their own words. Every objection goes in the register, untidied.

What can go wrong: very few objections come in, and the group concludes everyone agrees. More often, people do not yet trust that an objection will be received well. The keeper should raise one themselves, publicly, in the first week, and the ring lead should answer it in writing.

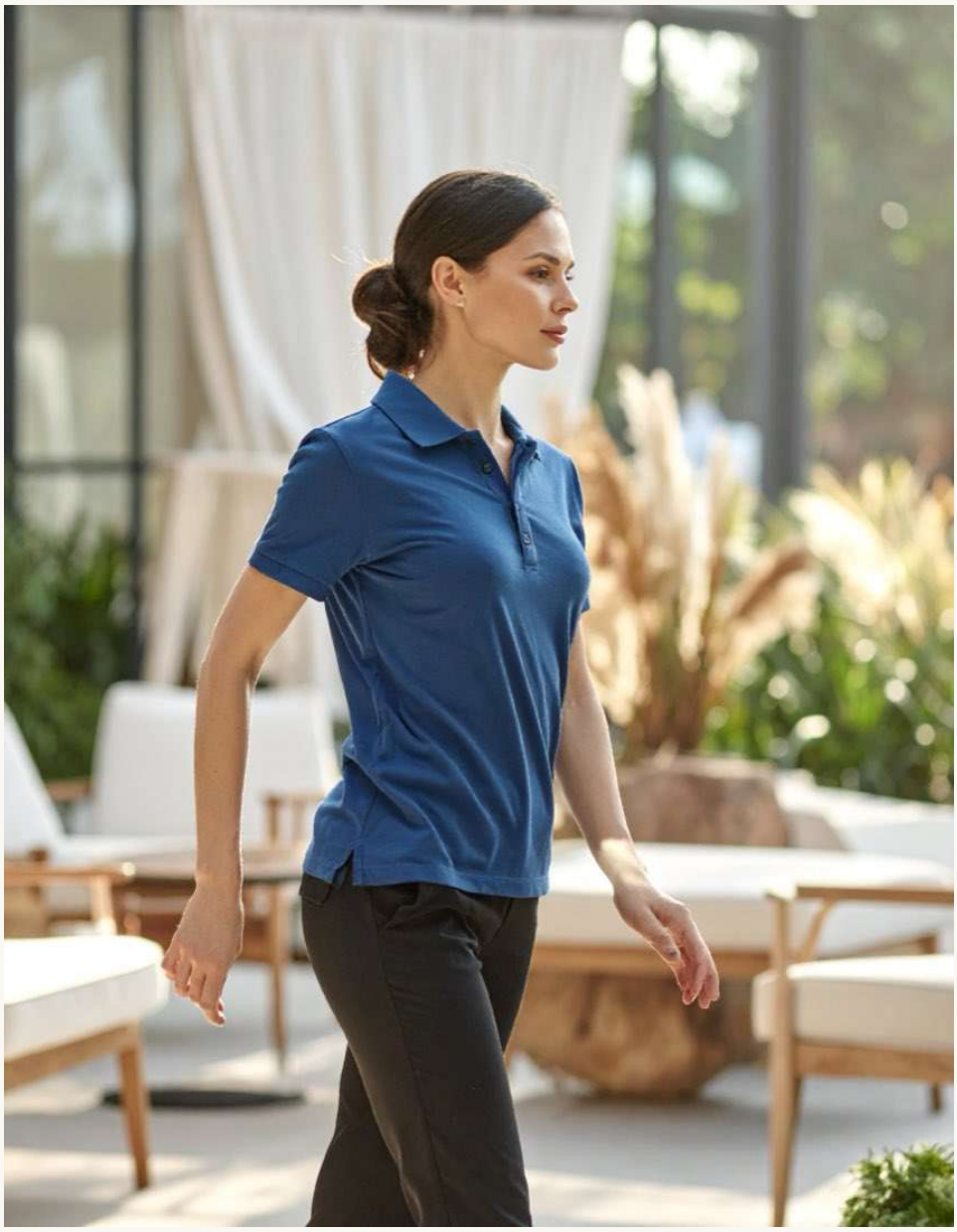
Weeks 18 to 21 · Lens three and lens four. The steward liaison and the working group complete the two global lenses: the people who supply us, and the planet. Lens three requires the supplier questions from Chapter 5: when we last visited, how fast we pay, whether they can name a standard they meet. Lens four requires the purchase ledger in physical units. For many organisations these are the hardest lenses, because the figures belong partly to someone else. Write *not measured* where a figure does not exist. Do not estimate to fill a blank.

Week 22 · Read the portrait. The working group lays the four lenses side by side and marks, in each, the row that surprised it most. For each marked row, it writes a question beginning *What would it take to…*. Four questions in all.

Weeks 23 to 25 · Cost the four questions. For each question, the ring lead and the relevant manager produce a rough cost and a rough benefit, using the organisation's own figures. Chapter 5's composite furniture maker found its finishing-shop pay rise cost less than the year's recruitment of leavers. Comparisons of that kind are the purpose of this step. The costs need not be precise. They need to be honest about their imprecision.

Week 26 · Quarter review. The keeper reads the register's open lines aloud, and the working group reports the four questions and their rough costs to the sponsor.

Decision for the sponsor at the end of quarter two: which of the four questions to try first. The usual answer is the cheapest, because a cheap success builds the trust a harder trial will need. Sometimes the right answer is the most important, if it concerns safety, pay below a living benchmark, or a legal exposure the portrait has revealed. The sponsor writes down which, and why.



Quarter three · Trying (weeks 27 to 39)

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Quarter three · Trying (weeks 27 to 39)

The third quarter tries one or two things and measures what happens.

Week 27 · Design the trial. For each chosen question, the working group writes a one-page trial: what will change, where, for how long, what will be measured before and after, in which units, and what else might explain any change. The last line matters most. Chapter 7's Costa Rican evaluators spent years separating a programme's effect from everything happening around it. An organisation's trial cannot be that rigorous, but it can name the obvious confounders: the weather, a new contract, a change of staff.

Weeks 28 to 37 · Run it. The trial runs for ten weeks. Recorders continue their ordinary flows. The ring lead keeps a short weekly note of anything unexpected. Nobody changes the trial's design halfway through unless it is causing harm.

What can go wrong: the trial produces an early good result and the organisation rolls it out everywhere before it has finished. Hold the line. A result that holds for ten weeks is worth more than one that held for three.

Weeks 32 and 33 · The first stewardship conversation. In the middle of the trial, the steward liaison visits the organisation's most important supplier or steward and drafts, together with them, the Stewardship Contract from Chapter 7. It need not be signed this quarter. The conversation is the point.

Week 38 · Read the trial. The working group compares before and after, names what else might explain the difference, and writes a one-page result. The result has three possible headings: *it worked*, *it did not work*, *we cannot tell*. All three are useful. The third is common, and the honest response is usually to run the trial for longer, or on a second site.

Week 39 · Quarter review. The keeper asks: what did we try, what did we learn, and did anything we learned contradict what we expected? The register is updated: objections the trial answered are marked, and any objection the trial proved right is marked *conceded*.

Decision for the sponsor at the end of quarter three: whether to adopt the trial's change permanently, extend it, or stop it. The sponsor writes down the reason.

Quarter four · Writing it down (weeks 40 to 52)

The fourth quarter turns a year of work into documents that will outlast the people who did it.

Weeks 40 to 42 · Draft the Purpose Charter. The sponsor, the keeper and the working group draft the Purpose Charter from Chapter 6: the needs the organisation exists to meet, the limits it will respect, what happens when a decision would trade one ring for the other, the ways of working, the keeper, the threshold for new commitments, and where the shortfall will be published. The draft goes to everyone in the organisation for comment, with two weeks to reply.

Weeks 43 and 44 · First targets, if any. Only now, with a year of figures, does the organisation consider targets, and only for measures whose figures it trusts. A target should be set as a direction and a range for the next year, not a point, and it should name the fairness rule behind it, as Chapter 3 showed in the example of the regional food company. Many organisations will set targets for one or two flows and leave the rest as measures to be read.

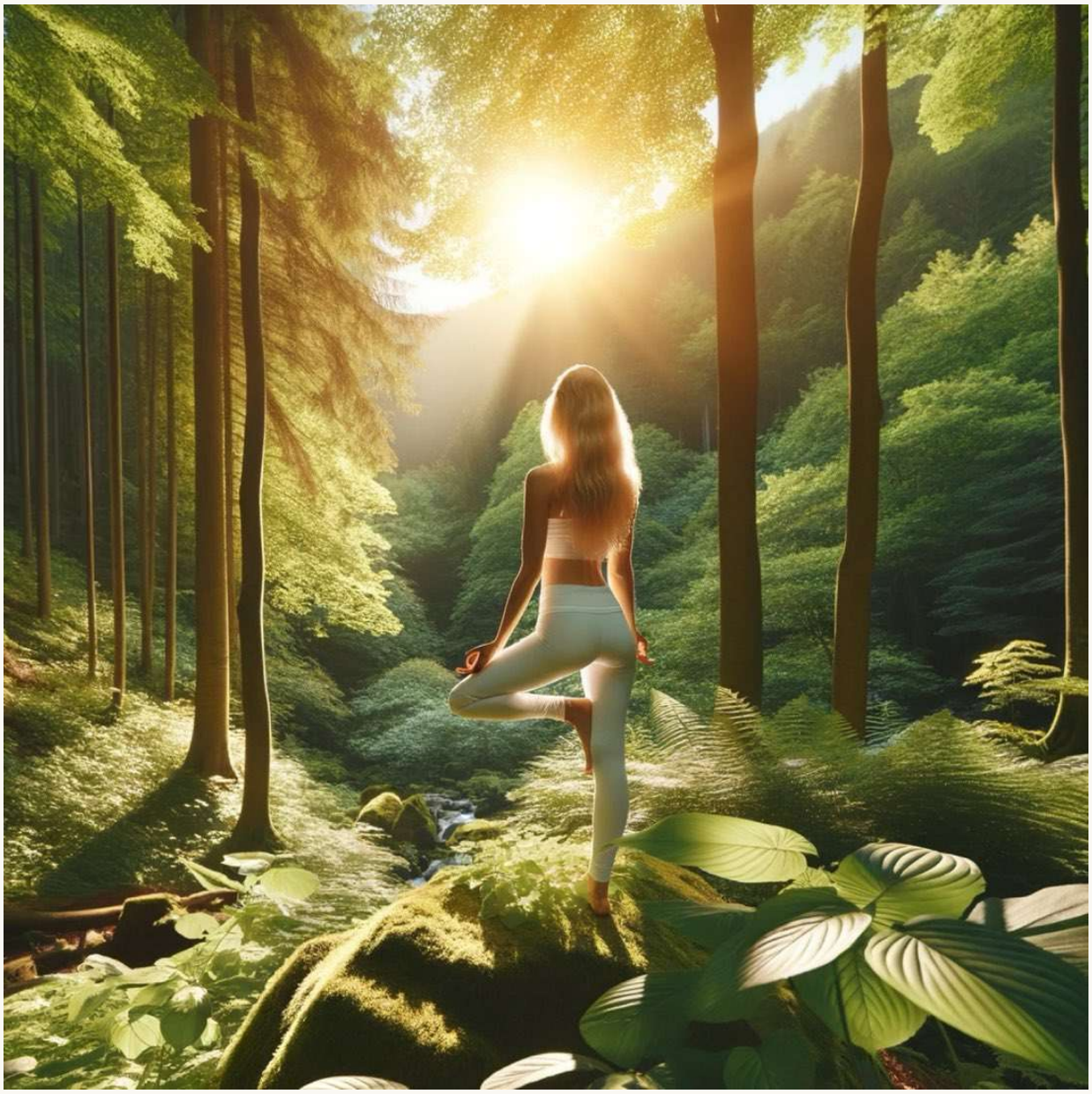
Weeks 45 to 47 · The Honest Dashboard. The ring lead produces the first annual Honest Dashboard from Chapter 8: the portrait on page one, the reading on page two. Last year's figures, where they exist, are on

the same basis. The third paragraph of page two, what we still cannot measure, is written by the working group.

Week 48 · The board meeting. The board, or the leadership team, adopts the Purpose Charter and receives the Dashboard. The keeper reads page two aloud. The ring lead reads aloud every *conceded* line in the Objection Register. Chapter 10 has the scripts for the questions that will come.

Weeks 49 to 51 · Tell people. A short note to everyone in the organisation and to the stewards it depends on: what was found, what was tried, what has been adopted, what is still unknown. The note should include the most disappointing figure, and should not include any word that promises an outcome.

Week 52 · Rest and redraw. The working group redraws the Metabolism Map from scratch, without looking at the first one, and then lays the two side by side. The membership of the working group changes. The ring lead takes a week off.



The second year

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The second year

The second year has the same shape and goes faster. The first quarter takes four weeks instead of thirteen, because the figures are already being recorded. The portrait is redrawn from fresh figures before last year's is consulted. The register carries over. The trials are larger, or run on more sites. The charter is reviewed, not rewritten, and the keeper's annual report names one decision it changed, one it should have changed and did not, and one line that needs rewriting.

By the third year, if it is working, the ring lead's role has shrunk, because the recorders, the working group and the keeper have absorbed it into ordinary work. That is the sign the year has become a practice. If the role has grown instead, the organisation has built a department, and should ask why.

The year at small scale

A business with twelve people has no board, no working group and no non-executive. The year still works, compressed. The owner is the sponsor and the ring lead. The keeper is someone outside the business whose judgement the owner trusts: an accountant, a former colleague, a customer of long standing, met for an hour once a quarter. The working group is everyone, at a monthly staff meeting with one item on the agenda. The recorders are whoever pays each bill.

The figures are fewer and easier to find, because the owner usually signs every invoice. The four lenses can be drawn in an afternoon. The trial is one change in one corner of the business, and its result is visible within weeks. The charter is a single page pinned in the back office.

What does not compress is the first quarter's rule: no targets until the figures have been seen. A small business is more tempted than a large one to announce a goal, because its owner is closer to its customers and wants to tell them something. The temptation is worth resisting for thirteen weeks. A small business that announces a target it later misses loses more trust, in a smaller town, than a large firm ever does.

The bakery in Chapter 4 is a composite of exactly this scale. Its owner found, by reading one year five ways, a waste loop held together by two tired bakers, a miller whose convenience the bakery was financing, and a year of growth the street had given and the bakery had not earned. Nothing in the year above would have been needed to find those things except the decision to look.

Seven ways the year goes wrong

Every organisation that runs this year will meet at least two of these. None is fatal.

The sponsor delegates and disappears. The ring lead runs the year alone, and the board hears about it once, in week 48. Remedy: the sponsor attends the four quarter reviews, and the keeper asks at each board meeting what the sponsor has decided.

Targets arrive in week three. Someone senior wants a number to announce. Remedy: the sponsor's paragraph said no targets in the first quarter. Read it aloud. Offer instead to announce the first honest figures at the end of quarter one.

The figures become a weapon. A manager's area shows badly, and the manager is blamed. Remedy: the rule that nothing found in the first year is anybody's fault. The ring lead says it at every meeting until it is believed.

Every objection is answered and none conceded. The register becomes a list of rebuttals. Remedy: the keeper reads the register at each quarter review and asks which objection the organisation has been wrong about. If none, the register is not being used honestly.

The global lenses are left blank. Lenses three and four are hard, and the working group quietly fills only lenses one and two. Remedy: *not measured* is an acceptable entry; an empty lens is not. Every lens must have at least one measured row by the end of the year.

The trial is too big. The organisation tries to change everything at once and cannot tell what worked. Remedy: one change, one place, ten weeks.

The vitality signs are turned into targets. Someone proposes rewarding teams for taking their leave. Remedy: Chapter 8's rule. Read the signs. Do not reward them.

What this chapter cannot promise

A year of this work does not guarantee that an organisation's flows will fall, that its people will thrive or that its suppliers will be better off. It guarantees that the organisation will know, more accurately than before, where it stands on each, and that it will have built the habits and documents to keep knowing. Whether it then acts is a decision for its leaders, made with better information than they had. The manual is a way of seeing and of deciding. It is not a promise of results.

The Tool: The Year Plan

One page, kept on the wall of the room where the working group meets.

QUARTER	WEEKS	THE JOB	DOCUMENTS	THE SPONSOR'S DECISION
Before	−2 to 0	Decide and find the figures	Sponsor's paragraph; list of figures held	Working group membership
One · Seeing	1–13	Count, without targets	Two-Ring Ledger; Metabolism Map	Continue or stop
Two · Portrait	14–26	Draw all four lenses; open the argument	Four-Lens Portrait; Objection Register; four questions, costed	Which question to try
Three · Trying	27–39	One or two trials, ten weeks each	Trial designs and results; first Stewardship Contract draft	Adopt, extend or stop
Four · Writing	40–52	Charter, dashboard, board	Purpose Charter; Honest Dashboard	Adopt the charter

Under the table, four lines:

- *The sponsor's paragraph* (copied here, word for word).
- *The keeper* (name, and the question they will ask at every meeting).
- *The one rule:* nothing found in the first year is anybody's fault.
- *The virtuous cycle we named in week one* (written here, so it is not forgotten).

A note on method

The roles, timings and failure modes in this chapter are a practitioner's design, built from the tools of the preceding chapters; they are not drawn from a published evaluation of any organisation, and the durations are guides, not findings.

References

1. Santa Anna, A. *Ecstatic Economics*, manuscript `ch05.md`, reflection questions, question 3. Luminous Prosperity Inc., 2026.
2. Santa Anna, A. *Ecstatic Economics*, manuscript `ch03.md`, "Common Pitfalls: Romanticization, Appropriation, and Premature Synthesis". Luminous Prosperity Inc., 2026.

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